

Energy Performance Contract
RFP - Technical Review
HUD Review Checklist
07-27-2010

HUD Review Information

1. PHA Name: _____
2. Date RFP received for review: ____/____/____
3. RFP Review assigned to: (check one)
 - a. ☐ HUD Field Office, ☐ HUD PH Energy Center, ☐ HUD Contractor
 - b. Review Person:
 - i. Name: _____
 - ii. Phone: _____
4. PHA is using the "Sample HUD RFP" (check one) ☐ Yes ☐ No
5. Date RFP Approved ____/____/____

Guidance

The RFP must comply with 24 CFR 85.36 (d) (3)

(3) ***Procurement by competitive proposals.*** The technique of competitive proposals is normally conducted with more than one source submitting an offer, and either a fixed-price or cost reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids. If this method is used, the following requirements apply:

- (i) Requests for proposals will be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals shall be honored to the maximum extent practical;
- (ii) Proposals will be solicited from an adequate number of qualified sources;
- (iii) Grantees and sub grantees will have a method for conducting technical evaluations of the proposals received and for selecting awardees;
- (iv) Awards will be made to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered; and

General Review

The RFP clearly defines:

6. ☐ Housing Authority name.
7. ☐ Scope of work.
8. ☐ Housing Inventory – Detailed description of current properties including:
 - a. Project Number
 - b. Project Name,
 - c. Building Type
 - d. Unit Count
 - e. Occupancy
9. ☐ Historical utility data for each property. Recommend three years of data.
10. ☐ Date proposals are due.

Regulator Review

11. ☐ The RFP identifies the process that the PHA will undertake to evaluate the ESCo proposals.
12. ☐ The RFP identifies the process that the PHA will undertake to select the ESCo.
13. ☐ The selection process clearly states that the highest ranked firm that is the most advantageous to the PHA will be selected.
14. ☐ The RFP identifies all of the evaluation factors used in ranking the proposals.
15. ☐ The RFP identifies the relative importance of the evaluation factors.
16. ☐ Cost is included as one of the evaluation factors.
17. ☐ Sufficient time is provided for the ESCos to respond to the RFP. Minimum of 30 days is recommended.
18. The following HUD forms are included as part of the contract:
 - a. ☐ Form HUD-5369B – Instruction to Offerors – Non-Construction
 - b. ☐ Form HUD-5369C – Certifications and Representations of Offerors.
 - c. ☐ Form HUD-5370C – General Contract Conditions, Non Construction.

HUD Approval Letter

19. The reviewer will develop a draft HUD approval letter. The letter is to list:
- a. Recommend that the PHA advertise the RFP in the following “
 - i. National Association of Housing & Redevelopment Officials (NAHRO, www.nahro.org)
 - ii. Public Housing Authority Directors Association (PHADA, www.phada.org)
 - b. Recommend that the PHA develop a “Finding of Fact” documenting the selection process including copies of all signed evaluation forms.

Reviewer Signature

The checklist reviewer certifies that they have reviewed this RFP in accordance with provisions of this checklist.

Reviewer Signature: _____, Date ____/____/____

Reviewer Name:(print)_____

Approval Comments